

NPSP GAU Allocation

A GAU (general accounting unit) is a great way to manage allocation of funds to particular uses or budgets. The NPSP GAU feature allows finance teams to comply with various designation requirements, and with the Rallybound Salesforce integration, you take advantage of this NPSP feature!

Rallybound can associate an opportunity with a NPSP GAU Allocation. To make this association, follow these steps:

1. Create a GAU record in Salesforce. See <https://trailhead.salesforce.com/en/content/learn/modules/opportunity-settings-in-nonprofit-success-pack/configure-gau-allocations-and-payments-npsp> for how this can be done.
2. Locate the unique 18 digit Salesforce ID for this GAU record. This can either be found in the URL when viewing the record or by exposing the ID field on your layout.
3. Enter this ID in your Rallybound admin panel under Settings > Integration Options > Optional Salesforce Settings > Salesforce Opportunities / Donations > NPSP GAU Allocation ID

Advanced

Liquid can be entered in the above Rallybound field as long as the result of the liquid snippet will be a valid 18 digit Salesforce ID. This can be useful, for example, if one would want to set one GAU ID for registrations and a different one for donations.

Use the placeholder `{{ Type }}` for the type of opportunity, possible values are:

- Donation
- Registration (or Registrations)
- Recurring Donation
- Value entered in the dictionary entry "Global - Donation-Ticket Noun" (for ticket purchases)

See <https://helpdesk.rallybound.com/display/KB/Liquid+Templating> to learn more about liquid.

Requirements

- Salesforce Nonprofit Success Pack
- Rallybound Apex Sync Package 2.4 or higher (link to download can be found in admin panel)

Limitations

- At this time this feature is only supported for opportunities. Rallybound cannot associate a Salesforce campaign with a GAU Allocation.
- At this time this feature only supports allocating 100% of an opportunity with a GAU Allocation. Rallybound can not associate an opportunity with multiple GAUs.